

lesson 6 use + maintain your systems

WELCOME

Welcome to the final lesson of *Organize Your Paper Clutter!* We've covered a lot of ground in this workshop, haven't we? By now I expect you have sent a fair share of paper to the recycle bin and set up super-effective paper organizing systems. Congratulations to you! It feels so good to get out from under the burden of all those toppling stacks of paper, doesn't it?

This final lesson is designed to serve as a wrap-up and to highlight some of the key points. Plus, you'll get some final thoughts about using and maintaining your systems going forward.

Keep in mind that it's perfectly okay if you still have a paper backlog to sort through. As I mentioned in the very first lesson of this workshop (and a time or two along the way), organizing paper is one of the slowest organizing projects there is. The only exception I know of is trying to organize Polly Pocket and all her teeny, tiny shoes! So, if you're not quite out of the (paper) woods yet, don't worry a bit about it. (And just be thankful you don't have boxes full of Polly Pockets to organize!)

Simply keep doing what you've been doing throughout this workshop—spending fifteen minutes a day on your incoming paper and tackling your backlog little by little—and you will be out from under your paper clutter! I promise...and it will happen sooner than you think!

USE YOUR SYSTEMS: MAKING YOUR SYSTEMS WORK FOR YOU

Now that you have your systems set up for collection, action, reference and archive paper, you have a designated spot for each and every piece of paper that makes its way into your home. This is a terrific step forward! Setting up your systems isn't the whole ball game, of course—now you have to use them effectively.

Getting organized is step one. Staying organized, by using your systems consistently, is the next and ongoing step in the process.

“Make it fun! You know I'm a big fan of fun, and I'm always on the lookout for ways to make using a new system or creating a new habit a fun process. If you're creating the habit of checking your tickler file every day, sprinkle in some goodies along with the stuff that has to get done. Drop in some inspiring quotes, or a piece of your favorite candy, or even the gift card to Borders you've been holding on to since the holidays! Knowing there's something fun lurking in your tickler file will make creating the new habit of checking it an even more pleasurable thing to do!”

Create the habits necessary to use your systems effectively

Organizing is a combination of projects, systems and habits. In this workshop, you've tackled a number of projects and you've set up your paper systems. Going forward, staying organized requires consistently using these new systems along with the paper organizing process covered in Lessons 2 and 3.

This is where habits enter the equation. Whether or not you create healthy paperwork habits will be the true predictor of whether or not you feel on top of your paper going forward. Quite simply, habits are the routine use of your paper organizing systems, and it is these habits that will keep you organized on an ongoing basis.

For each paper system you set up, the final step in the process was to identify the habits needed to use the system effectively. But...identifying the needed habits and actually creating those habits are two separate things. It's important to give yourself time to create the new habits! It takes a minimum of 21 days to create one new habit! And it's very likely you have more than one new habit to create. So the bottom line is this: give yourself time (ample time!) to create these new habits!

Start with your most mission-critical systems—the action systems. First, focus on creating the habits needed to use these systems effectively. If you're using a tickler file, for example, you will need to create the everyday habit of checking your daily folder. Until you're doing this routinely, make yourself notes and reminders. Make it easy to succeed! Attach this habit to something else you're doing consistently, like checking your daily to-do list or appointment calendar. In time, accessing the

documents in your tickler will become second nature, and you won't need reminders any longer. Then you can concentrate on creating your next most important paperwork habit.

Remember to decide

Remember, processing paper involves making decisions. Often our paper clutter is the result of delayed decisions. So replace the *touch-it-once rule* with a new rule: decide once!

Carve out time for taking action

As you learned earlier in this workshop, sorting, categorizing and storing your papers aren't the only steps in an organized approach to handling your paper. One of the most important steps and the core reason for organizing your paper in the first place, is to be able to perform the actions associated with your paper in a timely, efficient and low stress manner. But after your paper is organized and your systems are set up, you still need to carve out time to pay the bills, sign the permission slips and follow up on the health insurance claims. It's really no surprise when you see this in writing, but your paper systems are most beneficial to you when you make time to use them and spend time performing the actions associated with your papers.



Build your paper routines around your other routines and habits. Go through papers right when your kids get home from school as part of their afternoon snack. Or handle paperwork right after the dinner cleanup.

Let's do a quick gut check: Have you carved out specific times for handling your paper—both for processing it and doing the tasks associated with it? If you haven't carved out a specific time in your schedule for sorting and acting on your paper, things will begin to pile up again. Select a time that fits your schedule and energy level. If you deal with paper at work all day, and feel tired at night, get up fifteen minutes earlier and take care of your paper first thing in the morning when you're fresh. Figure out what works for you, and then do it! (And if you're doing something that doesn't work for you...try something different!) Getting organized is so often a case of trial and error and trying again! It's okay if you try something and it doesn't work...just try something else.

Take action now...whenever you can

Once you get into the habit of processing your paper and making decisions about it on a daily basis, work on creating the *do it now* mindset. Remember, if you can do it now, do it now! The sooner you take action on something the less time and energy you have to spend keeping track of the task and worrying about getting it done!

Fill in the gaps

Hopefully at this point the amount of paper on your flat surfaces has been reduced to a minimum. If going forward you discover a particular type of paper continues to appear on your flat surfaces, take note of it and decide if it belongs in a system that you've already set up, or if it still needs a home. If it does have a home, ask yourself (in an inquisitive and non-judging way) why it isn't getting to this designated spot. Are you afraid you won't remember that you put it in there? Is the storage location too out of the way? Run through the list of key things to have in place for each system (below) to troubleshoot why a certain type of paper isn't getting to where it needs to be.

If on the other hand you find a particular paper doesn't have an established home, fill in the gap. Create new systems for paper as you discover you need them, or look for ways to incorporate new types of paper into an existing system.



everyday example:

One potentially cluttered type of paper in our household is the box tops we collect for the kids' school. This doesn't really fit neatly into any of my other paper organizing systems, so I created a new system. A small metal bucket sits on a shelf in our laundry room to collect box tops until it's time to send them to school.

Make it easier on yourself

Once you've given yourself sufficient time to use a new system, if it still feels clumsy or cumbersome, run through this list to determine what, if anything, you could tweak to make your system work better for you.

KEY THINGS TO HAVE IN PLACE FOR EACH SYSTEM:

* The right location!

There's a saying about the three most important things to consider when buying a home: location, location, location! Why is location so important? It's the one thing you can't change about your home! With organizing systems, location is equally important, as we learned from my client who kept her file cabinet in the garage. The good news is that moving the location of your paper systems is loads easier than moving the location of your home!

☞☞ If you have an overflowing "to file" folder, ask yourself if your file cabinet is close enough to where you're handling your paper. Can you move your file cabinet or implement a temporary file box, and make life with paper just a notch easier? ☞☞



“I’m a huge fan of keeping action and reference items in sight and in reach, but I don’t like visual clutter. Using storage solutions that I find attractive and inspiring helps me strike the balance.”

If you find you’re resisting using a system, consider if its location is right for you. The simple act of moving a paper system to a different location (the place where that paper is naturally landing) is often just the fix necessary. Remember, there’s a very fine line between a system that is easy and close enough to use, and one that’s just a notch too complicated or inconvenient to get to.

* **In your sight = In your mind**

If you’re a visual person and you need to see something to remember it, keep your most frequently used systems in sight. If you originally set out to try using something closed or put away (and you find you’re not using it), bring it out into the open for a while. See if keeping your most used systems in sight helps you use them more consistently.

* **Clear-cut boundaries**

Have you clearly defined what each of your systems will be used for? Duplicate systems or fuzzy boundaries make it harder to use your systems. If you aren’t exactly sure where a piece of paper belongs, you’ll fall back on your tendency to keep it out, so you remember where it is. Make sure your systems are clear-cut and you know what belongs where. Then, make sure you have established triggers to remind you to use systems.

The file map template from Lesson 5 will help you remember your filing structure going forward. If you didn’t create a file map at the outset, and begin to find it difficult to remember what belongs where, pull out this handy tool and put it to use for you!

* **Defined responsibility**

Have you clearly defined who is responsible for using each system or performing the actions associated with it? Make sure that each system has an owner, one person who is ultimately responsible for taking care of upkeep of that system. Remember—even though it’s usually *you*, it’s not always.

* **Triggers to remind you to use the system**

A trigger is the mechanism you put in place to remind you to take action on your paper at the right time. For a tickler file, the trigger is simply a new day—each day you check what’s in your daily folder. For other types of systems, you may need to record your triggers on a to-do list. As you put a piece of paper into your system, ask yourself how you will remember to take action on it. Then, record

your action on your to-do list or calendar, keeping in mind that you want to track your actions in as few places as possible.

* **Simplicity**

Check your systems for simplicity. Is it easy to add to your system and perform routine tasks like creating a new file folder or binder tab? Look for ways to make your systems a notch simpler. If color coding turned out to be too cumbersome to keep up with, go with a single color system. Store basic filing supplies such as empty folders and your label maker right at your workstation.

* **Make it fun!**

Remember, the best organizing systems, the ones that will quickly become your favorite and therefore most used systems, are fun! Add a dose of creativity to your paper systems, and you'll enjoy using them for years to come!

MAINTAIN YOUR SYSTEMS

Maintaining your paper systems simply means keeping your systems current—so that they reflect your current life and projects. The best way to maintain is on an ongoing basis—when you add something new to a system, decide if the new paper outdates an old one. If so, remove the old one as you put away the new one. Let's discuss each system in turn.

Collection: daily maintenance

Maintaining your collection system is simple enough in theory—get to the bottom of it every single day.



Action: routine maintenance

For your action systems, whenever an action or project is completed, clear out the associated paper. Any project materials you may want to refer to later should be transferred to your reference or archive system.



Reference: routine maintenance

When you add a new item to your reference system, ask yourself if it replaces an old one. For example, whenever a new sports season begins, add the schedule to your reference



binder. While you're in there, take out old schedules and info from the past season, and pitch them!

Archive: routine and annual maintenance

For your archive items, maintain your systems routinely whenever possible. If you get a new washer and dryer, for example, discard the user manuals when you put the new one in your warranties file folder. Consider annual maintenance for items such as your yearly tax returns. When you file this year's tax documents, shred the documents that are now eight years old.



Reassess regularly

Remember, one of the best ways to stay on top of your paper is to keep it out of your home in the first place! Continue to look for ways to slow the flow of paper into your home. Reconsider your magazine subscriptions from time to time. Do you have time to read all the ones you get? Are you still enjoying them? Is there something else you'd rather be doing with your time? This thought process applies to any source of paper coming into your home—magazines, catalogs, e-zines and even book clubs. If you find you aren't using it...let it go.

As you use your systems, and access them to add and subtract documents, reassess. Are you filing away reference documents you thought you would retrieve, but in fact never do? If so, consider saving even less of this type of paper.

TAKE ACTION!



Create a maintenance schedule for each paper system you have set up. My personal recommendation, if you don't enjoy paper and if stacks of unprocessed paper cause you stress, is to maintain as you go. Stay on top of your daily paper every single day, and look for papers to remove from your reference and archive systems, each and every time you get into them.

If you decide to maintain a system less frequently, say for example, you process items in your collection bin just once a week, it is imperative that you first decide on the frequency and then add this task to your to-do list so you remember to do it. For each paper system you have created, decide how often you will handle the paper associated with it and keep the system up to date.

Stay Motivated: Remember it's easier to do it today than to wait until tomorrow! Plus, you won't be late and you won't have to worry about getting the task done!

STAY IN ACTION!

Even though the workshop is drawing to an end, the key to staying organized is to keep taking action! Here's how:

ACTION STEP 1: CONTINUE TO PROCESS YOUR PAPER EVERY SINGLE DAY!

Of all the habits we've covered in this workshop, handling today's paper today is one of the most beneficial, especially if piles of paper make you feel overwhelmed. If you haven't created this habit yet, give it some more time! Focus on the days you do remember, and if you forget a day or two, just jump back in the next day. In time, taking care of your paper every day will become second nature.



ACTION STEP 2: CONTINUE TO TACKLE BACKLOG WHILE STAYING ON TOP OF YOUR DAILY PAPER.

If you still have backlog to sort through, remember to simply tackle this little by little as you have been doing. Keep your primary focus on your daily paper, but carve out time to work on your backlog, too. If you approach your back log consistently, bit by bit, you will get out from under your paper clutter sooner than you think!



ACTION STEP 3: CONTINUE TO IDENTIFY AND CREATE YOUR NEW HABITS!

As discussed earlier in this lesson, when it comes to creating new paper habits, follow this process. First, identify the habits needed for each system. Second, prioritize which habit to concentrate on first. Then, focus on creating the most important habit. Once you have a habit under your belt, move on to the next most important habit on your priority list.



ACTION STEP 4: CONTINUE TO SET UP AND / OR TWEAK YOUR SYSTEMS.

If you haven't set up all of your paper systems yet, continue this process as you go forward. Make sure each source of paper coming into your home, as defined in the handout "paper, paper, everywhere!" has a home. Then, give yourself time to use your systems and evaluate them. If you find they aren't working great for you, follow the steps outlined in this lesson to tweak them so they're an ultra-effective tool in your arsenal against paper clutter!



WORKSHOP RECAP!

Wowee, wow! What a ride this has been, wouldn't you agree? Together, we've covered a lot of ground and tackled loads of paper clutter. Congrats to you!

Our journey began way back in Lesson 1 by laying the foundation. You took a step back so you could get some perspective on where all your paper was coming from, and you took the all-important step of slowing the flow of paper into your home. At this point you should be starting to see the fruits of your labor, with less unwanted paper in your home! You also set goals for your paper organizing projects. If you still have a way to go until you reach your ultimate goals, that's okay. You now have the tools you need to get there...and I'd be willing to bet the road seems much shorter and much easier to navigate now than it did way back in Lesson 1! Keep that goal statement and your desired end result front and center as you continue to dig out of the backlog and take daily action on your new paper.

In Lesson 2, you learned the first steps in the paper organizing process and learned about the importance of making decisions about your paper. You used this process to begin sorting through your daily paper and the backlog in your home using temporary sorting containers.

Then, in Lesson 3 you got really busy! You learned about the various paper storage systems and how to select the best solutions for you and your particular application. You also learned about the importance of taking action on your paper at the earliest possible time! You implemented two of our four essential paper systems, your collection system and your action system. Your collection system became the first step in reclaiming the flat surfaces in your home, as it serves as the central repository for new paper that makes its way into your home. Your action systems ensure that paper with associated to-dos gets done on time and with minimal stress.

In Lessons 4 and 5, we took things a bit easier, but created your final two paper systems—reference and archive. You set up a reference binder and organized your recipes in Lesson 4, and in Lesson 5 we addressed your archive paper, creating safe homes for your important documents like legal and financial records! Hooray—this was a huge accomplishment!

In our final lesson, we've wrapped things up by covering the key points of paper organizing, reiterating the importance of giving your new systems time, and giving



“ It is my sincere hope that an overflowing collection box like the one shown is just a distant memory from the past. Thank you for joining me on this journey. I hope you enjoyed it! ”

yourself time to create the new habits that go along with them. You also learned how to troubleshoot your systems and tweak them so they work even better for you going forward!

As this workshop draws to a conclusion, first and foremost, I'd like to say *bravo* to you! This workshop is an intense one! Getting through those mounds of paper and making the commitment to create new paper habits is a huge accomplishment, from which you will continue to reap huge rewards!

I'd also like to say thank you so much for allowing me to guide you on this journey! I hope that organizing your paper clutter has truly given you, and will continue to give you, that unburdened feeling and well-deserved sense of freedom.

Best wishes to you,

Alej